



Good Practices in Call Recording

1) There should be clear goals and objectives

Like any activity that is undertaken in a company or organization, a call monitoring and/or recording program should be aligned with the business and the purpose of the parent organization. At a minimum, the goals of a call monitoring program should be:

- To align customer satisfaction goals with quality monitoring goals
- To evaluate the quality of an organization's customer service operation
- To evaluate the customer service skills of employees
- To evaluate employees troubleshooting skills and tools
- To compare the actual transaction experience to documented information
- To evaluate the effectiveness of a training program

2) Overcome employee objections and worries by communicating clearly about the why, the who, and the when.

There should be established measurements for call quality, and procedures for reporting. You may wish to use a checklist or scorecard, and you can see an example here:

<http://www.thinkhdi.com/~media/HDICorp/Files/Library-Archive/Silent-Monitoring-Score-Card-Checklist.pdf>

3) Record all calls

In the best of all possible worlds, each telephone call should be recorded and stored for whatever period of time your customer service training and compliance programs mandate.

4) Know the legal ramifications

Be familiar with FCC rules and regulations. There must be notification that a call is being recorded:

<http://www.fcc.gov/guides/recording-telephone-conversations>

5) Know the compliance ramifications

If your organization deals in health records, HIPAA compliance impacts the recording, handling and storage of calls which may contain personal information. If your organization deals with credit card information over the phone, PCI DSS compliance impacts the handling of calls which may contain credit card numbers, security codes, and expiration dates. Your organization should have security protocols for dealing with all your customers' personally identifiable information (PII).

See <http://www.neccf.org/whitepapers/VPI> -

[Critical Call Recording Laws Regulations and Best Practices for Ensuring Compliance.pdf](#)

6) Review of recorded calls should be done by trained and authorized personnel, and should be applied to

- Quality review on a periodic basis, tied to performance review
- Quality review following a complaint or other problem
- Disagreement with a customer's recollection of what was said

7) Analysts should be trained by a professional trainer to meet the criteria they will be judged on.

8) The call recording and review program should be assessed periodically and adjusted as needed.

Based on Robert Last's HDI Focus *Book Best Practices in Call Monitoring*, and online sources.